

A-4 Suggested topics to include in selected strategic planning elements

Ideally, the agency strategic plan is created through a data-informed process that begins with a scan of the internal and external environment. The product of this assessment is an inventory of internal strengths and weaknesses, and external threats and opportunities (also known as a SWOT analysis). From this analysis, the agency can identify the critical issues, risks, obstacles, and opportunities that must be addressed through strategies implemented during the period covered by the strategic plan.

Listed below are possible topics the agency can address in its appraisal of the external environment, analysis of trends in customer characteristics, and assessment of internal resources. This is by no means an exhaustive list; rather, it is supplied for agencies to use as a point of departure, adding or omitting items depending on what is relevant to them. When examining a topic, consider the current state, trends from the recent past, likely future trends, and the trend's impact on the agency and its ability to realize its mission, goals, and objectives.

Appraisal of external environment

The Economy

- Š National economy
- Š Washington economy
- Š Regional economies

Population Trends

- Š Key trends and forecasts by relevant cohort, by geographic area
- Š Assumptions and caveats
- Š Social trends

Assessment of the Market or Industry

- Š Industry cycles
- Š Competition – alternative sources for similar products or services
- Š Key trends

Generic Service Delivery Issues

- Š Technology trends
- Š Infrastructure trends
- Š Media trends – print and broadcast

Authorizing Environment

- Š Federal, state, and local government
- Š Trends and outlook for key issues such as access, possible changes in laws and regulations, cost escalation, funding and reimbursement patterns, taxation, debt
- Š Executive and legislative branch actions and trends
- Š Judicial decisions and trends
- Š Public opinion
- Š Authorizing environment expectations of the agency
- Š Agency trends in meeting those expectations

Stakeholder Trends

- Š Key issues and considerations
- Š Stakeholder expectations of the agency

Data Sources: A Starting Point

- Š Office of the Economic and Revenue Forecast Council quarterly economic and revenue forecasts, which can be accessed at <http://www.wa.gov/ofc/home.htm#Revenue%20Forecast%20Press%20Releases>.
- Š Office of Financial Management population, demographic, economic, and other trend data, with links to other entities with related data, which can be accessed at <http://www.ofm.wa.gov/demographics.htm>
- Š Office of the Caseload Forecast Council's forecast and trend data for K-12 enrollment, social service caseload, and prison populations, accessible at <http://www.wa.gov/cfc/home.htm>

Trends in customer characteristics

Customer Profile

- Š Customer segments, numbers, geographic location, and key characteristics
- Š Key trends affecting customer needs and preferences, and their ability or willingness to participate in agency programs
- Š Customer expectations of the agency
- Š Agency trends in meeting customer expectations
- Š Implications for service delivery

**Internal resource
assessment (e.g., staff,
facilities, technology)**

Agency Service Delivery System

- Š Quality of service
- Š Key factors affecting service delivery
- Š Geographic location
- Š Characteristics and performance of internal processes
- Š Costs, level of effort necessary to maintain existing service delivery mechanisms

Human Resources

- Š Staff size, composition, experience, training, morale
- Š Recruitment and retention trends
- Š Managerial style and competencies
- Š Trends in staff availability, skills, and knowledge
- Š Trends in contractor availability, skills, and knowledge
- Š Physical safety
- Š Implications for service delivery

Information Technology

- Š Characteristics and performance of information technology
- Š Implications for service delivery

Capital Facilities

- Š Characteristics, quality, functionality, and adequacy of capital facilities; implications for service delivery
- Š Usage trends
- Š Maintenance trends
- Š Implications of service delivery changes on capital facilities needs and adequacy

Supplier Trends

- Š Key issues and considerations
- Š Implications for service delivery

Agency Organizational Characteristics

- Š Impact of agency organizational structure
- Š Significant historical events
- Š Trends in agency communication
- Š Trends in agency culture and morale
- Š Trends in “synergy,” or how well different parts of the agency work together
- Š Implications for service delivery